Department of Accounts Reportline

Agency Security Officer Manual



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Reportline Overview

Introduction

DOA has developed a web-based system that provides access to an electronic version of reports that are not currently received via Mantissa Remote Print.

Authorized users may access Reportline using the internet at

http://Reportline.doa.state.va.us

Reportline is designed to be user-friendly and requires little intervention from outside resources. However, DOA realizes there may be some functions individuals may need assistance with and it has developed this administrative manual to aid agency personnel.

REPORTLINE Features

Reportline provides Commonwealth of Virginia agency personnel with the means to:

- View reports **not printed remotely onsite** for **3 years** past the report run date.
- Store electronic versions of these reports on an agency-based server or individual personal computer.
- Perform searches for specific verbiage found in the electronic reports.
- Maintain agency user access internally.
- View Help pages on each page of **Reportline**.



Reportline Overview, Continued

Database Security

State-of-the-art security features are provided to maintain confidentiality of report information.

- **Application Security**—requires a Logon ID and password for system access. Individuals will be required to keep this information confidential to provide the utmost security to Commonwealth data.
- **Secure Socket Layer (SSL)**—uses a 128-bit encryption routine to protect the data as it travels back and forth over the Internet.
- Encrypted File System (EFS)—is an operating system feature that
 protects sensitive data and prevents unauthorized access to the file
 directory.

Access Requirements

- Browser must be enabled for Java Script.
- Browser must be enabled for Cookies.
- Browser must be enabled for Secure Socket Layer (SSL) Security (128-bit version).
- If connecting to the site from behind a firewall or proxy server, it must allow SSL (port 443) communication.
- *Internet Explorer* browser, version 4.0 or higher.
- Designed to be viewed at a screen resolution of 800 by 600 or greater, with a minimum of 256 colors.
- Connection speed of 56k modem (or higher) is highly recommended.

Web Address

http://Reportline.doa.state.va.us



Reportline User Security

Security Levels

Reportline has four levels of application security as follows:

- ➤ Application Administrator—DOA Database Administration personnel who establish Systems Administrator security.
- > **Systems Administrator**—DOA application specific (i.e., CARS, CIPPS, FAACS) personnel who establish line agency Reportline Security Officer security.
- > **Reportline Security Officer**—Line agency security officer who establishes Individual User security.
- ➤ *Individual User*—Line agency personnel who utilizes Reportline to access electronic reports.

Agency Security Officer

Each agency is required to identify one or more Reportline Security Officers. The Reportline Security Officer is responsible for adding, deleting, and modifying Individual User security profiles. Security access for Reportline Security Officers must be requested by completing the **Reportline Request Form** found on DOA's **Reportline** website. This form is also used for individual user security setup.

The Reportline Request Form must include information identifying both the agencies and the Report Families for which security will be performed.

Reportline Security Officers may be established to provide security to reports from all report families or only selected report families. (Click on the Report Availability button on the Reportline Logon Page to determine which reports are found in each "family.") Please keep in mind that once a Reportline Security Officer has access to provide individual security, the Reportline Security Officer also has security to view the data on these reports. Therefore, careful consideration should be given to the identification of the Reportline Security Officer based upon the information available in that report family.

The form must be signed by the Fiscal Officer or Agency Head identified on the Authorized Signatory card, Form DA04-121. Fax the *Request Form* to **(804)** 371-8587 or mail it to:

Michael Rider, EDP Reportline Security Officer Administrative Services Division Virginia Department of Accounts P.O. Box 1971 Richmond, Virginia 23218-1971



Reportline User Security, Continued

Reportline Request Form You can access a PDF copy of the **Reportline Request Form** for Reportline Agency Security Officer and Agency Individual Users. This PDF form is located at DOA's **Reportline** website.

Department of Accounts Reportline Request Form

		User Type		Agency User
Date		· (check one)		Agency Security
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Reportline User Security, Continued

Individual Security

Individual User access to specific reports on **Reportline** is requested by completing the **Reportline Request Form**. This PDF form is located on DOA's Reportline website.

Using the Report Family Table, identify:

- ➤ the Report Family,
- level of security,
- > and if necessary, the specific reports to which access should be granted/excepted.

Each agency is responsible for determining who is deemed appropriate to authorize requested access by Report Family. As one individual may have reason for access to more than one Report Family, *authorization* may be required by multiple employees. Similarly, as Reportline Security Officers may be limited to specific Report Families, establishment of requested security access may require *establishment* by multiple employees.

Accessing Reportline

General Logon With a Valid Password The employee enters his Logon ID and password and clicks on the **Logon** button.



Accessing Reportline, Continued

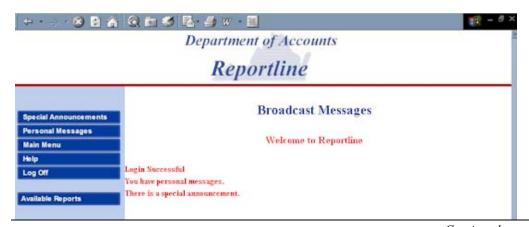
Step	Action			
1	Enter Logon ID (7 to 9-Character/Alpha-Numeric)			
2	Enter the User Password			
3	Click on the Logon button.			
If a corr	If a correct password is entered, the <i>Broadcast Messages</i> page displays.			

Navigation

Navigation buttons located in the left-hand margin of the page link the user to other **Reportline** pages or perform requested functions as described below.

BUTTON	DESCRIPTION
Log On	Initiates the logon process for Reportline with entry of a
	valid logon and password.
Forgot	Links user to the Forgot Password page where user can
Password	view their previously stored hint or receive an email to
	their previously stored email address providing their
	password.
Contact Us	Allows the user to send an e-mail with suggestions and/or
	questions to DOA.
Security	Links the user to information on application security and
	access requirements that support Reportline.
Available	Links the user to a list of reports that may be available for
Reports	viewing.

The employee is then linked to the *Broadcast Messages* page for messages and other menu selection items.



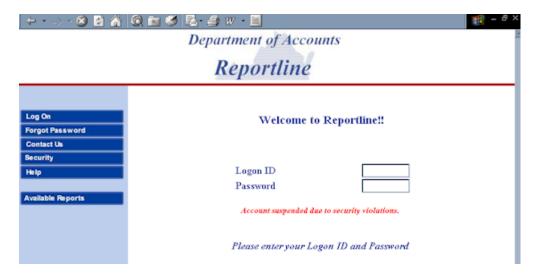
Accessing Reportline, Continued

Invalid Log On If an invalid Logon ID is entered, the message "Invalid ID" is displayed.



Suspended Account

After 5 (five) failed logon attempts the following message is displayed "ACCOUNT SUSPENDED DUE TO SECURITY VIOLATIONS."

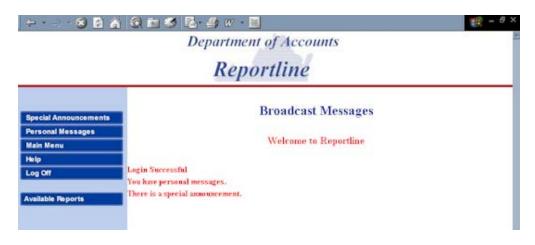


Violations can only be cleared by a DOA Systems Administrator. Contact DOA by using the **Contact Us** button to request the violations be cleared. Alternatively, **Reportline** violations will be cleared each workday evening.

Establishing Individual Security

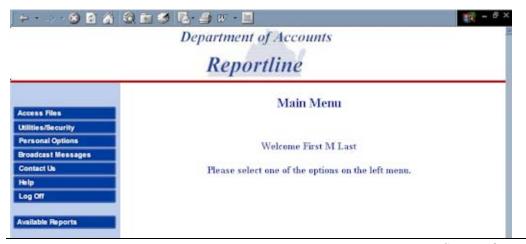
Successful Login

A successful Logon brings the Security Officer to the **Broadcast Message** page.



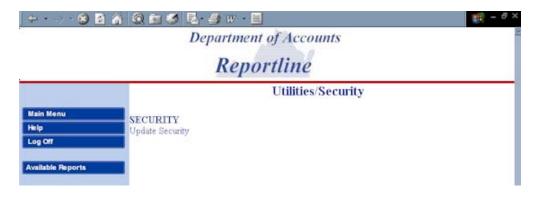
Utilties/Security Button

From here, click on **Main Menu**. As a Security Officer, the **Utilities/Security** button displays. Click on this button.



Establishing Individual Security, Continued

You will see only one utility on this page as line agency Security Officers are not permitted to perform other system utility functions. Click on **Update Security**.



To Add a New Security Record Initially, your own security record displays. To add a new security record, click on the **Add** button in the left-hand column.



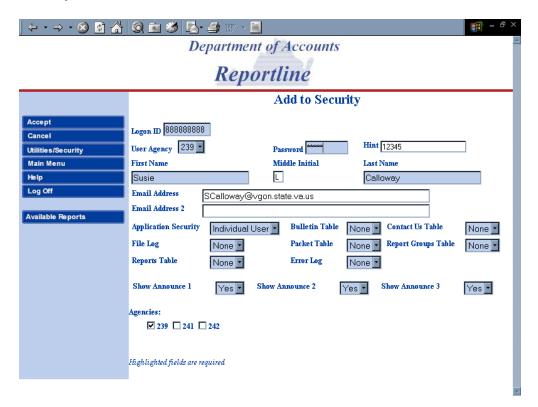
Establishing Individual Security, Continued

Individual Security Profile

Complete the security profile by providing the following:

- ➤ Logon ID
- > Password (must be 5 to 8 characters)
- First Name and Last Name
- Agency (click those agencies for which the Individual user has been authorized)

Note: Other fields are displayed but are uneditable by the line agency Security Officer.



Click on **Accept**.



Establishing Individual Security, Continued

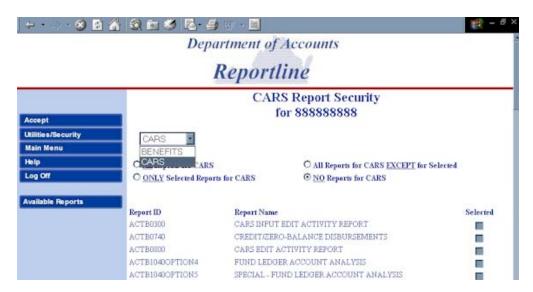
Report Security Button Gives Employee Report Access The message "Record Added" is displayed. However, the employee has not been granted access to any reports thusfar. At this point, a new button—Report Security—is added to the display in the left-hand margin. Click on Report Security.



Establishing Individual Security, Continued

Report Family

The dropdown box displays the Report Family for which the Security Officer is permitted to grant access. The page header defaults to the first Report Family in the drop-down list. Select the Report Family for which security has been requested.



Level of Security

Click the radio button that applies to the level of the security requested for the individual. For access levels other than **All** or **No Reports**, click the check box beside each report that should be included/excluded from the individual's access.



Establishing Individual Security, Continued

Adding Report Families

<u>Note</u>: Only those radio buttons for which the Security Officer has been granted access are available for choosing. Any access that is not granted is grayed.

Click **Accept**. The message "Record Added" is displayed. Repeat this process for each Report Family as requested.

Once completed, the Security Officer must communicate the Logon ID and the Password to the Individual User.

Forgotten Password?

Forgot Password Button

If any **Reportline** user forgets the assigned password, the employee may click on the **Forgot Password** button. The employee will go to the *Forgot Password* page.



E-Mail Address

If a hint was previously stored, it is displayed. Additionally, the employee may enter the E-mail address previously stored in the security record and have the password emailed to that address. The E-mail address entered on this page **MUST** match that which was previously stored. If not, the message "The Email Address you entered (email address) did not match" is displayed.

Forgotten Password, Continued



Confirmation Message

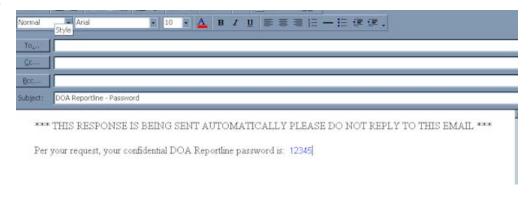
If a matching E-mail address is entered, **Reportline** provides a confirmation message.



Forgotten Password, Continued

Employee Receives E-mail

And the employee receives the following E-mail.



Employee Has Not Established a Hint or E-Mail Address If the employee has not established a hint or E-mail address in his security record (see **Personal Options** topic in the **Reportline User Manual**), the *Forgot Password* page will be blank. The Security Officer will have to assist the employee.

DOA Contact

Contact Us Button

Use Reportline's Main Menu screen's **Contact Us** button for assistance.

(ReportlineSecurityOfficerManual.doc)